# TRACKING BRAND USER PATTERNS BY HEAVY, MODERATE AND LIGHT TV VIEWERS

Most advertisers who rely heavily on TV as their primary communications medium are concerned about the fact that heavy viewers—who account for about 20% of the population—get 40-50% of their TV "ad weight," while light viewers (also about 20% of the total population) receive a mere 3-5% of their GRP tonnage. As we have noted elsewhere in this volume, advertisers often prod their ad agencies to find new ways to divert media weight from the heavy to the light viewing segments of their target group. However, as we've said, this is not easily done when only using conventional TV, and the trade-offs in CPMs and total media weight often argue against such a move.

One of the most surprising aspects of targeting light consumers is the lack of serious research or testing regarding the potential value of such viewers to the advertiser and, more importantly, whether a heavy-up effort against this segment is really a sound strategy. In order to provide some perspective on this issue, Mediamark Research & Intelligence, LLC. (MRI) provided us with product and brand user/buyer data by TV viewing quintile for a large number of product categories that are all heavily invested in TV advertising. Our findings confirmed the results of similar analyses we conducted in the 1980s and 1990s; despite the extremely disproportionate concentration of GRPs against heavy viewers relative to light viewers, on the whole, this seemed to have little or no effect on the degree to which heavy or light viewers favored one brand over another.

To demonstrate this point, we have selected a number of product categories and, within them, their leading brands, and linked the relative incidence of product purchase or use by TV viewing quintiles. These range from the heaviest viewing 20% (Quintile I) to the lightest viewing 20% (Quintile V). The accompanying tables provide summaries of the results for owners of imported car brands (first table); hotel stays, women's clothing and personal computers (second table); paint/stain, laundry detergent and dry dog food (third table); bar soap, meal/dietary supplements and children's vitamins (fourth table); butter, cold cuts and salad dressing (fifth table); snack cakes, artificial sweetener and frozen pizza (sixth table); beverages (seventh table); and family restaurants/steakhouses (eighth table).

The first table reveals that adults who own new foreign cars were more likely than the total population to be among TV's lightest viewers. Other product categories showed greater degrees of variation; surprisingly, frozen pizza brands had strong representation among both heavy and light viewers. Yet in most cases, light viewers received much less ad weight for the brands than did heavy viewers.

It is possible—subject to sample size limitations—to slice and dice the MRI studies by demographics within heavy-light viewer groups, or by singling out heavy product users/buyers in a similar manner, but the overriding sense we have of such evaluations (with a few exceptions) is that the effects of heavy-light ad weight that competing brands attain using TV seem to cancel each other out. In other words, if you are a heavy TV-spending brand in a competitive set with rival brands who buy their media similarly, then virtually all of the brands overload heavy users with "excess" GRPs while "underweighting" light viewers. The result is that brand shares are more or less unaffected among heavy-light viewer segments, since each brand obtains about the same "share of voice" in each quintile, effectively drowning each other out.

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*Tracking Brand User Patterns By Heavy, Moderate & Light TV Viewers Continued*

This raises some questions. Would a brand that attains, say, 10,000 GRPs nationwide, score significant sales gains among light viewers if it sacrificed 500 or 1,000 heavy viewer rating points for 100-200 added among light viewer ones? And could it do so while holding its own among the heavy viewers? The answer depends upon many considerations, for example, how much of a "share of voice" increase could the brand afford to lay in among light viewers? Are we talking about a 10% increase, or 25-50%? Certainly expectations of market share hikes induced by a 10% GRP increase among light viewers are dubious, since these would be incremental GRPs, laid in over an existing base that has already attained some measure of ad awareness levels. A 50% light viewer GRP increase—if feasible—might make quite a difference, however, providing the advertiser was willing to take risks with his heavy viewer sales positioning to accommodate such a move.

Another issue is the likelihood that light viewers not only watch far less television than the norm, but are also less attuned to the medium from an advertising receptivity standpoint. Can one attain the same levels of ad awareness with 100 light viewer GRPs as one gets with 100 GRPs directed at heavy viewers who are generally more favorably disposed to TV commercials?

The nature of the ad campaign and the product class advertised are also factors. New campaigns for unique products may work better among light TV viewers—since they may be caught up by the novelty, as opposed to the seemingly redundant messages of "me too" products. This, like most aspects of the heavy-light quintile question, is highly speculative.

Finally, there is the obvious option of using other media—particularly magazines and the Internet—to balance media weight among heavy and light TV viewer groups. Here, too, all of the evidence suggests that, GRP weighting aside, telling a consumer the advertiser's story using two or three modes of communication produces better overall awareness and motivational results than just pounding it out solely via TV commercials.

A multitude of variables should be considered when the client raises concerns about light viewers. Unfortunately, few advertisers provide their media people or their ad agency counterparts with worthwhile information to guide them in such deliberations. Actual market tests exploring light viewer heavy-ups are few and far between and, even in the pretesting of new campaigns, it is rare indeed to find any indicators of the ad receptivity of heavy versus light viewers, nor of their potential susceptibility to the sales pitch used in the campaign.

This leaves the whole burden on media planners, who can manipulate GRP audience statistics in one way or another until the cows come home, but never provide a definitive answer. If the client insists on targeting light viewers, the agency will do its best to respond by tailoring its TV buys towards program genres or cable channels that lean in this direction, or by recommending an infusion of "other" media. Sadly, few advertisers who go this route will bother to see if it improves their ROI, or explore both the long term and short term effects to provide vital reference points for future deliberations. And so the question of whether or not to target light TV viewers comes up over and over again and generates the same highly subjective answers.

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# RELATIVE INDICES OF ADULT FOREIGN CAR BRAND OWNERS BY TV VIEWING QUINTILES

| | HEAVIEST I | II | III | IV | LIGHTEST V |
|---|---|---|---|---|---|
| **Own Foreign Vehicle** | | | | | |
| Acura[1] | 62 | 82 | 116 | 110 | 130 |
| Audi | 55 | 90 | 92 | 134 | 129 |
| BMW | 59 | 76 | 131 | 117 | 117 |
| Honda | 67 | 89 | 108 | 117 | 119 |
| Hyundai | 76 | 105 | 114 | 106 | 100 |
| Infiniti[1] | 59 | 116 | 111 | 126 | 88 |
| Isuzu[1] | 78 | 101 | 140 | 85 | 96 |
| Jaguar[1] | 67 | 81 | 145 | 119 | 88 |
| Kia[1] | 77 | 90 | 110 | 123 | 99 |
| Land Rover[1] | 114 | 70 | 84 | 41 | 191 |
| Lexus | 45 | 95 | 114 | 119 | 128 |
| Mazda | 67 | 86 | 119 | 122 | 106 |
| Mercedes | 85 | 93 | 99 | 116 | 107 |
| Mitsubishi[1] | 58 | 113 | 127 | 98 | 105 |
| Nissan | 85 | 102 | 118 | 96 | 98 |
| Porsche[1] | 83 | 81 | 138 | 122 | 76 |
| SAAB[1] | 57 | 80 | 72 | 110 | 180 |
| Scion[1] | 58 | 101 | 148 | 106 | 86 |
| Subaru[1] | 46 | 89 | 123 | 102 | 140 |
| Suzuki[1] | 93 | 118 | 80 | 96 | 113 |
| Toyota | 66 | 92 | 110 | 119 | 113 |
| Volkswagen | 48 | 88 | 98 | 132 | 134 |
| Volvo[1] | 48 | 93 | 125 | 118 | 116 |

*[1]Projections relatively unstable; use with caution.*

*Source: Mediamark Research & Intelligence, LLC. (MRI), spring 2008.*

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# RELATIVE INDICES OF ADULT HOTEL STAYS, WOMEN'S CLOTHING PURCHASED AND HOME PC OWNERSHIP BY TV VIEWING QUINTILES

| | HEAVIEST I | II | III | IV | LIGHTEST V |
|---|---|---|---|---|---|
| **Hotels & Motels** | | | | | |
| **Stayed At Any In Last 12 Months** | | | | | |
| Best Western | 66 | 104 | 112 | 109 | 109 |
| Comfort Inn | 72 | 93 | 103 | 117 | 115 |
| Country Inn & Suites | 64 | 76 | 98 | 137 | 126 |
| Courtyard (by Marriott) | 51 | 89 | 112 | 133 | 116 |
| Days Inn | 85 | 98 | 110 | 87 | 120 |
| Embassy Suites | 64 | 79 | 108 | 133 | 117 |
| Fairfield Inn (by Marriott) | 64 | 84 | 108 | 104 | 140 |
| Hampton Inn | 65 | 82 | 105 | 128 | 120 |
| Hilton | 47 | 77 | 121 | 139 | 115 |
| Holiday Inn | 65 | 112 | 110 | 96 | 117 |
| Holiday Inn Express | 69 | 103 | 116 | 105 | 107 |
| Hyatt | 47 | 73 | 132 | 123 | 126 |
| La Quinta Inn | 79 | 91 | 124 | 108 | 98 |
| Marriott Hotel, Resort and Suite | 57 | 93 | 133 | 114 | 104 |
| Motel 6 | 91 | 103 | 114 | 88 | 104 |
| Quality Inn | 77 | 86 | 111 | 80 | 146 |
| Ramada Inn | 95 | 59 | 116 | 91 | 139 |
| Super 8 | 111 | 100 | 98 | 77 | 114 |
| **Women's Clothing** | | | | | |
| **Bought Any** | | | | | |
| Suit (With Skirt) | 121 | 69 | 107 | 110 | 94 |
| Evening Dress | 54 | 77 | 128 | 122 | 119 |
| Maternity Clothes | 103 | 71 | 100 | 116 | 110 |
| Designer Jeans | 69 | 93 | 119 | 109 | 110 |
| Sports Bra | 75 | 98 | 96 | 109 | 122 |
| Girdle/Shapewear | 101 | 98 | 103 | 107 | 92 |
| Sweatpants | 93 | 89 | 106 | 107 | 105 |
| Swimsuit | 59 | 94 | 117 | 118 | 112 |
| **Personal Computers** | | | | | |
| **Own At Home** | | | | | |
| Desktop | 85 | 99 | 105 | 106 | 104 |
| Laptop/Notebook/Tablet | 73 | 91 | 107 | 116 | 111 |
| Acer | 82 | 107 | 99 | 103 | 108 |
| Compaq | 90 | 96 | 98 | 116 | 100 |
| Dell | 78 | 99 | 111 | 106 | 106 |
| e Machines | 93 | 115 | 101 | 98 | 94 |
| Gateway | 89 | 105 | 103 | 101 | 102 |
| Hewlett-Packard (HP) | 90 | 94 | 106 | 107 | 104 |
| Sony Vaio | 70 | 91 | 108 | 123 | 107 |
| Toshiba | 81 | 83 | 97 | 131 | 108 |

*Source: Mediamark Research & Intelligence, LLC. (MRI), spring 2008.*

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# RELATIVE INDICES OF HOUSEHOLD GOODS PURCHASED BY TV VIEWING QUINTILES

| | HEAVIEST I | II | III | IV | LIGHTEST V |
|---|---|---|---|---|---|
| **Paint/Stain** | | | | | |
| **Bought In Last 12 Months** | | | | | |
| Ace | 89 | 95 | 95 | 92 | 128 |
| Behr | 63 | 98 | 116 | 111 | 113 |
| Benjamin Moore | 66 | 88 | 103 | 127 | 116 |
| Glidden | 84 | 109 | 114 | 104 | 90 |
| Olympic Stain | 88 | 134 | 98 | 96 | 84 |
| Sherwin Williams | 80 | 89 | 116 | 121 | 94 |
| Wal-Mart | 91 | 104 | 98 | 94 | 113 |
| *Heavy Users (8+ Gallons In Last 12 Months)* | *78* | *99* | *102* | *114* | *107* |
| **Soaps & Detergents For Regular Laundry** | | | | | |
| **Households Used In Last 6 Months** | | | | | |
| All (Regular) | 109 | 93 | 101 | 98 | 100 |
| Bold | 137 | 77 | 109 | 111 | 66 |
| Cheer Free & Gentle | 107 | 104 | 99 | 92 | 98 |
| Dreft | 83 | 80 | 122 | 102 | 112 |
| Dynamo | 109 | 98 | 108 | 86 | 98 |
| Era Max | 121 | 73 | 100 | 90 | 116 |
| Fab | 124 | 123 | 94 | 78 | 81 |
| Gain with Bleach | 135 | 107 | 82 | 96 | 79 |
| Ivory Snow | 132 | 77 | 84 | 95 | 111 |
| Tide With Downy | 97 | 90 | 115 | 107 | 91 |
| Wisk | 114 | 105 | 98 | 86 | 97 |
| Woolite Liquid | 108 | 108 | 113 | 93 | 78 |
| Xtra | 132 | 104 | 88 | 86 | 89 |
| *Heavy Users (8+ Washloads In Last 7 Days)* | *82* | *99* | *107* | *106* | *105* |
| **Packaged Dry Dog Food** | | | | | |
| **Households Used In Last 6 Months** | | | | | |
| Beneful | 103 | 100 | 114 | 86 | 97 |
| Iams | 91 | 86 | 116 | 105 | 102 |
| Kibbles ‘N Bits | 124 | 91 | 117 | 83 | 85 |
| Nutro/Nutro Max | 75 | 101 | 104 | 106 | 115 |
| Ol’ Roy | 126 | 111 | 90 | 80 | 93 |
| Pedigree Complete Nutrition | 120 | 98 | 106 | 85 | 91 |
| Purina Dog Chow | 96 | 86 | 98 | 107 | 113 |
| *Heavy Users (25+ Pounds In Last 30 Days)* | *91* | *98* | *111* | *96* | *103* |

*Source: Mediamark Research & Intelligence, LLC. (MRI), spring 2008.*

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*Tracking Brand User Patterns By Heavy, Moderate & Light TV Viewers Continued*

# RELATIVE INDICES OF PERSONAL CARE BAR SOAPS, MEAL/DIETARY SUPPLEMENTS AND CHILDREN'S VITAMINS USED BY TV VIEWING QUINTILES

| | HEAVIEST I | II | III | IV | LIGHTEST V |
|---|---|---|---|---|---|
| **Personal Care Bar Soaps Used In Last 6 Months** | | | | | |
| Aveeno | 95 | 92 | 75 | 116 | 123 |
| Camay | 170 | 72 | 97 | 81 | 80 |
| Caress | 112 | 87 | 96 | 104 | 101 |
| Dial (Regular) | 108 | 109 | 106 | 88 | 89 |
| Dove Sensitive Skin | 116 | 96 | 99 | 101 | 88 |
| Irish Spring Original | 121 | 99 | 100 | 88 | 92 |
| Ivory | 100 | 102 | 107 | 94 | 97 |
| Jergens | 112 | 120 | 85 | 104 | 79 |
| Lava | 144 | 129 | 66 | 63 | 98 |
| Lever 2000 | 101 | 91 | 113 | 93 | 102 |
| Neutrogena | 99 | 70 | 107 | 94 | 130 |
| Olay | 112 | 92 | 96 | 98 | 101 |
| Palmolive | 120 | 79 | 102 | 115 | 85 |
| Safeguard | 122 | 115 | 115 | 82 | 65 |
| Suave | 86 | 121 | 103 | 94 | 95 |
| Tone | 124 | 105 | 91 | 105 | 76 |
| Zest | 122 | 101 | 99 | 92 | 86 |
| *Heavy Users (60+ Times In Last 30 Days)* | *103* | *105* | *103* | *96* | *92* |
| **Meal/Dietary Supplements Used In Last 6 Months** | | | | | |
| Boost | 142 | 118 | 116 | 76 | 48 |
| Carnation Instant Breakfast | 149 | 97 | 100 | 97 | 56 |
| Ensure | 152 | 107 | 87 | 67 | 88 |
| Glucerna[1] | 107 | 160 | 148 | 62 | 23 |
| Metabolife[1] | 64 | 84 | 127 | 68 | 157 |
| Slim-Fast | 106 | 107 | 114 | 97 | 77 |
| TrimSpa[1] | 129 | 146 | 60 | 91 | 74 |
| *Heavy Users (8+ Times In Last 7 Days)[1]* | *111* | *114* | *112* | *94* | *68* |
| **Vitamins For Children Households Used In Last 6 Months** | | | | | |
| Flintstones Vitamins | 72 | 97 | 104 | 110 | 117 |
| One-A-Day Kids[1] | 96 | 63 | 104 | 103 | 134 |
| Poly Vi Sol (Drops)[1] | 89 | 88 | 97 | 110 | 116 |
| Vitaball[1] | 38 | 119 | 131 | 100 | 112 |
| *Heavy Users (15+ Times Last 7 Days)[1]* | *81* | *45* | *159* | *110* | *105* |

*[1]Projections relatively unstable; use with caution.*

*Source: Mediamark Research & Intelligence, LLC. (MRI), spring 2008.*

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# RELATIVE INDICES OF BUTTER, COLD CUTS AND SALAD DRESSINGS USED BY TV VIEWING QUINTILES

| | HEAVIEST I | II | III | IV | LIGHTEST V |
|---|---|---|---|---|---|
| **Butter** | | | | | |
| **Households Used In Last 6 Months** | | | | | |
| Breakstone | 114 | 84 | 87 | 116 | 100 |
| Land O' Lakes Light | 111 | 98 | 112 | 98 | 82 |
| Land O' Lakes (Regular) | 97 | 102 | 102 | 102 | 96 |
| Shedd's Spread Country Crock Spreadable Butter | 116 | 107 | 93 | 92 | 92 |
| Tillamook | 66 | 82 | 101 | 116 | 134 |
| *Heavy Users (4+ Lbs. In Last 30 Days)* | *106* | *96* | *108* | *91* | *100* |
| **Cold Cuts** | | | | | |
| **Households Used In Last 6 Months** | | | | | |
| Armour | 139 | 112 | 72 | 86 | 90 |
| Boars Head | 92 | 99 | 116 | 99 | 95 |
| Carl Buddig | 93 | 103 | 93 | 106 | 104 |
| Healthy Choice | 87 | 96 | 94 | 117 | 106 |
| Hillshire Farm/Deli Select | 99 | 97 | 99 | 107 | 97 |
| Kahns | 197 | 105 | 82 | 76 | 40 |
| Louis Rich Carving Board | 101 | 82 | 119 | 108 | 90 |
| Oscar Mayer (Regular) | 122 | 108 | 94 | 83 | 93 |
| *Heavy Users (3+ Lbs. In Last 30 Days)* | *103* | *102* | *102* | *99* | *95* |
| **Salad Dressing** | | | | | |
| **Households Used In Last 6 Months** | | | | | |
| Good Seasons Fat Free | 84 | 109 | 133 | 90 | 84 |
| Hidden Valley Ranch Regular Bottled | 101 | 99 | 100 | 98 | 101 |
| Ken's | 83 | 101 | 115 | 97 | 105 |
| Kraft Light Done Right | 69 | 101 | 105 | 115 | 110 |
| Marie's | 90 | 120 | 95 | 100 | 96 |
| Marzetti's | 73 | 107 | 112 | 112 | 95 |
| Newman's Own | 67 | 95 | 116 | 107 | 116 |
| Seven Seas (Regular) | 109 | 119 | 114 | 84 | 75 |
| Western Salad Dressing | 118 | 119 | 87 | 72 | 105 |
| Wish-Bone Salad Spritzers | 94 | 107 | 103 | 89 | 107 |
| *Heavy Users (3+ Bottles Or Packages In Last 30 Days)* | *104* | *102* | *102* | *98* | *94* |

*Source: Mediamark Research & Intelligence, LLC. (MRI), spring 2008.*

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# RELATIVE INDICES OF SNACK CAKES, ARTIFICIAL SWEETENERS & FROZEN PIZZA USED BY TV VIEWING QUINTILES

| | HEAVIEST I | II | III | IV | LIGHTEST V |
|---|---|---|---|---|---|
| **Snack Cakes** | | | | | |
| **Households Used In Last 6 Months** | | | | | |
| Dolly Madison | 129 | 95 | 106 | 96 | 74 |
| Drake's | 117 | 89 | 107 | 100 | 88 |
| Entenmann's | 102 | 110 | 111 | 94 | 84 |
| Hostess Twinkies | 126 | 99 | 101 | 88 | 85 |
| Little Debbie | 111 | 96 | 95 | 100 | 98 |
| MoonPie | 138 | 94 | 101 | 86 | 81 |
| Snackwell's | 99 | 96 | 85 | 109 | 111 |
| Tastykake | 121 | 86 | 94 | 106 | 94 |
| *Heavy Users (4+ Boxes Or Packages In Last 30 Days)* | *125* | *100* | *92* | *98* | *85* |
| **Artifical Sweeteners** | | | | | |
| **Used In Last 6 Months** | | | | | |
| Equal | 108 | 108 | 105 | 98 | 81 |
| NutraSweet | 116 | 113 | 89 | 106 | 76 |
| Splenda | 103 | 95 | 110 | 98 | 95 |
| Sweet 'n Low | 131 | 104 | 98 | 97 | 70 |
| *Heavy Users (8+ Times In Last 7 Days)* | *135* | *103* | *104* | *86* | *71* |
| **Frozen Pizza** | | | | | |
| **Households Used In Last 6 Months** | | | | | |
| California Pizza Kitchen | 59 | 80 | 117 | 110 | 134 |
| Celeste Pizza For One | 111 | 107 | 95 | 89 | 98 |
| DiGiorno Rising Crust Pizza | 85 | 99 | 95 | 105 | 118 |
| Freschetta | 75 | 87 | 104 | 110 | 125 |
| Healthy Choice | 91 | 117 | 87 | 107 | 98 |
| Lean Cuisine | 69 | 111 | 100 | 97 | 123 |
| McCain Ellio's | 84 | 116 | 96 | 95 | 109 |
| Stouffer's French Bread Pizza | 120 | 98 | 95 | 89 | 98 |
| Tombstone Original | 96 | 94 | 100 | 98 | 112 |
| Totino's Party Pizza | 115 | 99 | 96 | 94 | 96 |
| *Heavy Users (4+ Packages In Last 30 Days)* | *95* | *97* | *100* | *99* | *108* |

*Source: Mediamark Research & Intelligence, LLC. (MRI), spring 2008.*

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# RELATIVE INDICES OF BEVERAGES DRANK BY TV VIEWING QUINTILES

| | HEAVIEST I | II | III | IV | LIGHTEST V |
|---|---|---|---|---|---|
| **Energy Drinks** | | | | | |
| **Drank In Last 6 Months** | | | | | |
| Full Throttle | 69 | 79 | 121 | 93 | 137 |
| Gatorade Energy Drink | 111 | 104 | 99 | 93 | 94 |
| Monster | 67 | 104 | 87 | 111 | 131 |
| Red Bull | 80 | 95 | 110 | 101 | 115 |
| Rockstar | 61 | 96 | 83 | 128 | 132 |
| *Heavy Users (5+ Drinks In Last 30 Days)* | *76* | *93* | *112* | *94* | *125* |
| **Imported Beer/Ale** | | | | | |
| **Drank In Last 6 Months** | | | | | |
| Amstel Light | 51 | 97 | 109 | 119 | 124 |
| Bass[1] | 32 | 101 | 90 | 112 | 166 |
| Corona Light | 66 | 84 | 125 | 108 | 117 |
| Dos Equis | 33 | 88 | 113 | 140 | 127 |
| Fosters | 66 | 71 | 135 | 119 | 109 |
| Guinness Stout[1] | 58 | 80 | 75 | 119 | 168 |
| Harp[1] | 28 | 69 | 79 | 124 | 200 |
| Heineken | 90 | 98 | 92 | 104 | 115 |
| *Heavy Users (4+ Glasses In Last 7 Days)* | *79* | *107* | *97* | *105* | *113* |
| **Regular Tea** | | | | | |
| **Households Used In Last 6 Months** | | | | | |
| Bigelow | 73 | 101 | 108 | 101 | 118 |
| Celestial Seasonings | 76 | 92 | 108 | 102 | 121 |
| Constant Comment | 85 | 103 | 133 | 66 | 113 |
| Good Earth | 50 | 88 | 96 | 120 | 147 |
| Lipton Regular Tea | 108 | 100 | 103 | 97 | 91 |
| Luzianne | 120 | 106 | 93 | 88 | 93 |
| Nestea | 112 | 89 | 80 | 116 | 103 |
| Red Rose | 100 | 94 | 101 | 85 | 120 |
| Salada | 120 | 89 | 110 | 88 | 92 |
| Stash | 68 | 93 | 95 | 116 | 127 |
| Tazo | 38 | 84 | 115 | 121 | 143 |
| Tetley | 112 | 90 | 110 | 83 | 105 |
| Twinings | 64 | 82 | 108 | 110 | 135 |
| *Heavy Users (4+ Cups Or Glasses In Average Day)* | *109* | *100* | *93* | *97* | *100* |

*[1]Projections relatively unstable; use with caution.*

*Source: Mediamark Research & Intelligence, LLC. (MRI), spring 2008.*

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# RELATIVE INDICES OF ADULT FAMILY RESTAURANTS/STEAK HOUSES BOUGHT AT BY TV VIEWING QUINTILES

| | HEAVIEST I | II | III | IV | LIGHTEST V |
|---|---|---|---|---|---|
| **Bought At Last 6 Months** | | | | | |
| Applebee's | 85 | 99 | 109 | 107 | 100 |
| Bennigans | 90 | 99 | 106 | 119 | 86 |
| Bertucci's | 46 | 92 | 140 | 128 | 95 |
| Big Boy | 86 | 123 | 126 | 94 | 71 |
| Bob Evans Farms | 90 | 129 | 109 | 90 | 81 |
| California Pizza Kitchen | 41 | 85 | 112 | 124 | 137 |
| Carrabba's Italian Grill | 65 | 108 | 131 | 93 | 102 |
| The Cheesecake Factory | 70 | 86 | 118 | 122 | 104 |
| Chili's Grill & Bar | 70 | 91 | 122 | 119 | 99 |
| CiCi's Pizza | 95 | 102 | 104 | 96 | 103 |
| Cracker Barrel | 89 | 108 | 109 | 101 | 93 |
| Dave & Buster's | 86 | 71 | 120 | 128 | 95 |
| Denny's | 112 | 111 | 99 | 98 | 81 |
| Friendly's | 77 | 112 | 127 | 76 | 108 |
| Hooters | 82 | 103 | 108 | 112 | 96 |
| International House Of Pancakes (IHOP) | 100 | 101 | 100 | 97 | 101 |
| Joe's Crab Shack | 58 | 108 | 143 | 105 | 86 |
| Marie Callenders | 83 | 137 | 87 | 81 | 112 |
| Old Country Buffet | 124 | 105 | 80 | 91 | 99 |
| Olive Garden | 72 | 107 | 106 | 110 | 105 |
| On The Border | 79 | 91 | 110 | 105 | 115 |
| Outback Steakhouse | 82 | 98 | 118 | 114 | 88 |
| Ponderosa | 108 | 131 | 86 | 96 | 78 |
| Red Lobster | 100 | 106 | 113 | 100 | 80 |
| Red Robin | 65 | 88 | 118 | 113 | 115 |
| Romano's Macaroni Grill | 56 | 115 | 116 | 108 | 104 |
| Ruby Tuesday | 79 | 102 | 115 | 113 | 91 |
| Smokey Bones | 120 | 108 | 117 | 98 | 57 |
| T.G.I. Friday's | 78 | 101 | 109 | 107 | 105 |
| Tony Roma's | 108 | 103 | 95 | 112 | 81 |
| Uno Chicago Grill | 57 | 92 | 123 | 114 | 115 |
| *Heavy Users (4+ Number Of Times In Last 30 Days)* | *99* | *108* | *113* | *94* | *85* |

*Source: Mediamark Research & Intelligence, LLC. (MRI), spring 2008.*